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ABSTRACT

This booklet outlines the process used by Elgin Community College to custom design training for business and industry. The implementation of the process, beginning with the initial request for training, is addressed rather than how the service is marketed. The booklet is divided into the following six sections: introduction, Illinois State Board of Education Product Abstract and table of contents, philosophy behind the model process for custom designing training for business and industry, the organization charts of the community college that developed the model process, a flow chart showing the steps implemented in the model process, and a narrative description of the 11 major steps that are implemented in the model process, with samples of forms that are used. The 11 major steps described in the model are the following: (1) receive initial training request, (2) identify subject matter expert to recruit as possible instructor, (3) meet with company representative, (4) identify instructor, (5) develop training proposal, (6) present training proposal, (7) have training proposal accepted, (8) implement orientation/development time (conduct needs assessment), (9) provide training, (10) implement evaluation process, and (11) do administrative follow-up. (KC)

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ED237774

How to Custom Design Training for Business and Industry

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Research and
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July 1983

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INTRODUCTION

Community colleges are becoming more involved in local economic development efforts by expanding the services they offer to include custom designed training for business and industry. Many of those colleges have expressed a need for information on how to custom design training.

This booklet entitled "How To Custom Design Training For Business And Industry" outlines the process used by Elgin Community College. The implementation of the process, beginning with the initial request for training, is addressed, rather than how the service is marketed. Dennis Sienko, Director of Occupational Relations at the College, developed the process.

It is our hope that this publication will be a useful guide for other community colleges when planning custom designed training for business and industry.

Illinois State Board of Education

Department of Adult, Vocational and Technical Education
Research and Development Section

Product Abstract

1. Title of material: HOW TO CUSTOM DESIGN TRAINING FOR BUSINESS AND INDUSTRY

2. Date material was completed: June 30, 1983

3. Please check one: New material X Revised material ____ Field-tested material ____

4. Originating agency: Elgin Community College

   Address: 1700 Spartan Drive, Elgin, IL Zip Code: 60120

5. Name(s) of developer(s): Pam Selby, Dennis Sienko, Dr. Lynn Willett

   Address: 1700 Spartan Drive, Elgin, Il Zip Code: 60120

6. Developed pursuant to Contract Number: 83-131-2.2.2

7. Subject Matter (Check only one according to Department of Education Code):

   Code

   ____ 01 Agricultural Education
   ____ 03 Business and Office Education
   ____ 04 Distributive Education
   ____ 07 Health Occupations Education
   ____ 09 Home Economics Education
   ____ 10 Industrial Arts Education
   ____ 16 Technical Education
   ____ 17 Trade and Industrial Education
   ____ 22 Cooperative Education
   ____ Career Education
   X Other (Specify) Vocational & Technical Ed.

8. Education Level:

   ____ Pre-K Thru 6 ____ 7-8 ____ 9-10 ____ 11-12
   ____ Post-Secondary X Adult ____ Teacher (Pre-service)
   ____ Administrator (Pre-Service) ____ Other (Specify) ____

9. Intended for Use By:

   ____ Student ____ Classroom Teacher ____ Local Administrator
   ____ Teacher Educator ____ Guidance Staff ____ State Personnel
   X Other (Specify) Local community college administrators

10. Student Type: Not Applicable

    ____ Regular ____ Disadvantaged ____ Handicapped
    ____ Limited-English Proficiency ____ Other (Specify) ____

11. Medium and Format of Materials:

X HARDCOPY	___ VIDEOTAPE	___ FILM	___ MICROFICHE
No. of pages 31	____ Minutes	____ Minutes	___ B & W
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___ Hard bound	___ Color	___ Color	
X Loose-leaf	____ inches	____ mm	
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Diagrams: Yes ____	No X		

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___ ____ Hz
___ Manual cue
___ Reel
___ Cassette
___ Cartridge

___ OTHER

Specify
____
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Contact Name ____ Phone ( ) ____

Address ____ Zip Code ____

14 What level(s) of assistance is required to provide implementation of this outcome?

X awareness
____ understanding
____ deciding
____ implementing

15 Are Consultive/Inservice (or staff development) available? Yes ____ No X

Contact
Illinois State Board of Education
Department of Adult, Vocational and Technical Education
Research and Development Section, E-426
100 North First Street
Springfield, IL 62777
(217) 782-4620

16 General Description (State the general objective and suggested method of use. Summarize the content and tell how it is organized. Write the description so that it can be used to promote the material. Continue on back of this sheet or on another sheet if necessary.)

17 Person Completing this Abstract Pamela J. Selby, Project Coordinator

Full Address

Elgin Community College
1700 Spartan Drive
Elgin, IL Zip 60120

Abstract Cont.

16. GENERAL DESCRIPTION

GENERAL OBJECTIVE: To provide community colleges with a model process for custom designing training for business and industry, enabling them to participate more effectively in their local economic development efforts.

SUGGESTED METHOD OF USE: Community college administrators who are responsible for custom designing training for business and industry are the suggested users of this product. The booklet is meant to be a guide which would be utilized by community colleges who wish to establish or change procedures for custom designing training for business and industry. The process described should be modified according to the policies and existing procedures at the college using the product.

CONTENT AND ORGANIZATION: The booklet is divided into the following six sections:

1) INTRODUCTION

2) TABLE OF CONTENTS

3) PHILOSOPHY - the philosophy behind the model process for custom designing training for business and industry

4) ORGANIZATION CHARTS - the organization charts of the community college which developed the model process

5) FLOW CHART - flow chart showing the steps implemented in the model process

6) DESCRIPTION OF STEPS TO CUSTOM DESIGN TRAINING FOR BUSINESS AND INDUSTRY - narrative description of the eleven major steps that are implemented in the model process, includes samples of forms that are used

The eleven major steps described are:

1) Receive initial training request

Abstract Cont.

2) Identify subject matter expert/possible instructor

3) Meet with company representative

4) Identify instructor

5) Develop training proposal

6) Present training proposal

7) Training proposal accepted

8) Implement Orientation/development time (needs assessment)

9) Provide training

10) Implement evaluation process

11) Do administrative follow-up

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PHILOSOPHY

To successfully work with business and industry, the community college must adopt the role of being a quality vendor of educational services, one of which is custom designed training for business and industry.

In order to truly customize training, the services of the entire college must be taken into consideration when assessing a company's needs.

Other important components of the philosophy are:

- Respond to training requests quickly in a business-like professional manner.
- Individualize the training programs to meet each company's unique needs.
- Maintain open lines of communication with the company.
- Provide competent instructors
- Use quality training aids and materials.

At Elgin Community College, we believe that to be successful we must respond quickly with quality.

ELGIN COMMUNITY COLLEGE

ORGANIZATIONAL CHARTS

Custom designed training is handled through the Office of Occupational Relations, which is part of the Department of Community Services, at Elgin Community College. See the following organizational charts.

PRESIDENT

Coordinator, Institutional Information Services
Public Relations
Publications
Press Relations

Asst. to the Pres., Research and Planning
A.I.D.P. Grant
Bilingual Access Program

VICE PRESIDENT
BUSINESS AND FINANCE
Personnel

Manager of the Bookstore

Director of Computer Services

Director of Finance
Business Office

Director of Food Service

Director of Maintenance
Physical Plant

Director of Operations
Grounds Maintenance
Housekeeping
Mail
Parking Control
Phone System
Receiving
Security

Director of Purchasing
Copy Center

VICE PRESIDENT
STUDENT AFFAIRS

Director of Admissions and Records
Graduation
Recruiting
Registration

Athletic Director

Director of Counseling
Advising
Career Center
Orientation
Testing

Director of Financial Aids and Placement

Director of Student Activities
Special Events Programming
Student Clubs and Publications
Student Government

VICE PRESIDENT
COMMUNITY SERVICES AND DEVELOPMENT
Grant Coordination
CETA Training
Special Events
Adult Re-entry Program

Director of Adult Basic Education
G.E.D.
English as a Second Language
Adult Basic Education
Indo-Chinese Refugee
Special Services
F.I.P.S.E.

Director of Community Education
Outreach Centers
Non-credit Programming
Operations
Use of Facilities

Director of Occupational Relations ✳
Local Government Training
Center for Employee and Management Development
Ill. Youth Center Training Program

VICE PRESIDENT
INSTRUCTION & ADMINISTRATION
Joint Educational Agreements
Management Information System (MIS)

Dean

Business
Accounting
Economics
General Business
Management
Real Estate
Savings and Loan
Secretarial

Health Occupations
Dental Assisting
Nursing, R.N.

Physical Education

Other
Culinary Arts
Restaurant Mgt.
DVS courses

Dean

Communications
English Composition
Literature
Journalism
Speech/Drama
Foreign Languages

Fine Arts
Music
Visual Art

Other
Graphic Design
INC courses

Dean

Technology
Automotive
Data Processing
Drafting
Electro-mechanical
Electronics
HVAC
Ind. Maintenance
Machine Tool
Plastics
Welding

Mathematics

Other
Aviation
Environmental Health
Fire Science
Pre-Engineering
Radio/TV
DVS Courses

Dean

Social and Behavioral Sciences
Anthropology
Geography
History
International Studies
Political Science
Psychology
Sociology

Human Services
Child Care
Gerontology
Juvenile Corrections
Mental Health

Humanities
General Humanities
Philosophy
Religion

Science
Astronomy
Biology
Botany
Chemistry
Food Science
Geology (Earth Science)
Microbiology
Physical Science
Physics
Physiology
Zoology

Other
Education
Food Manufacturing Technology
Health
Tot Spot

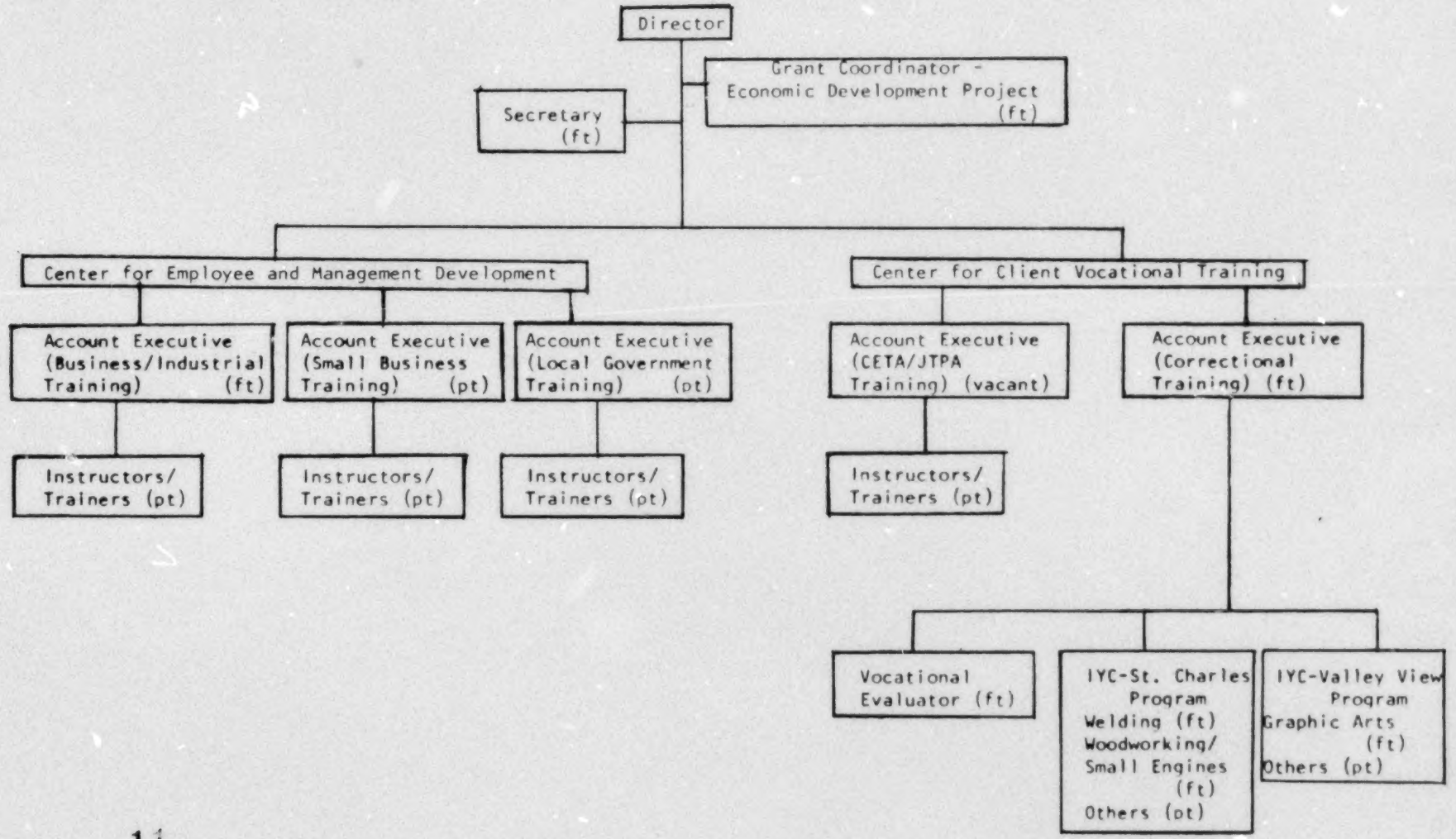
Dean

Non Traditional Education

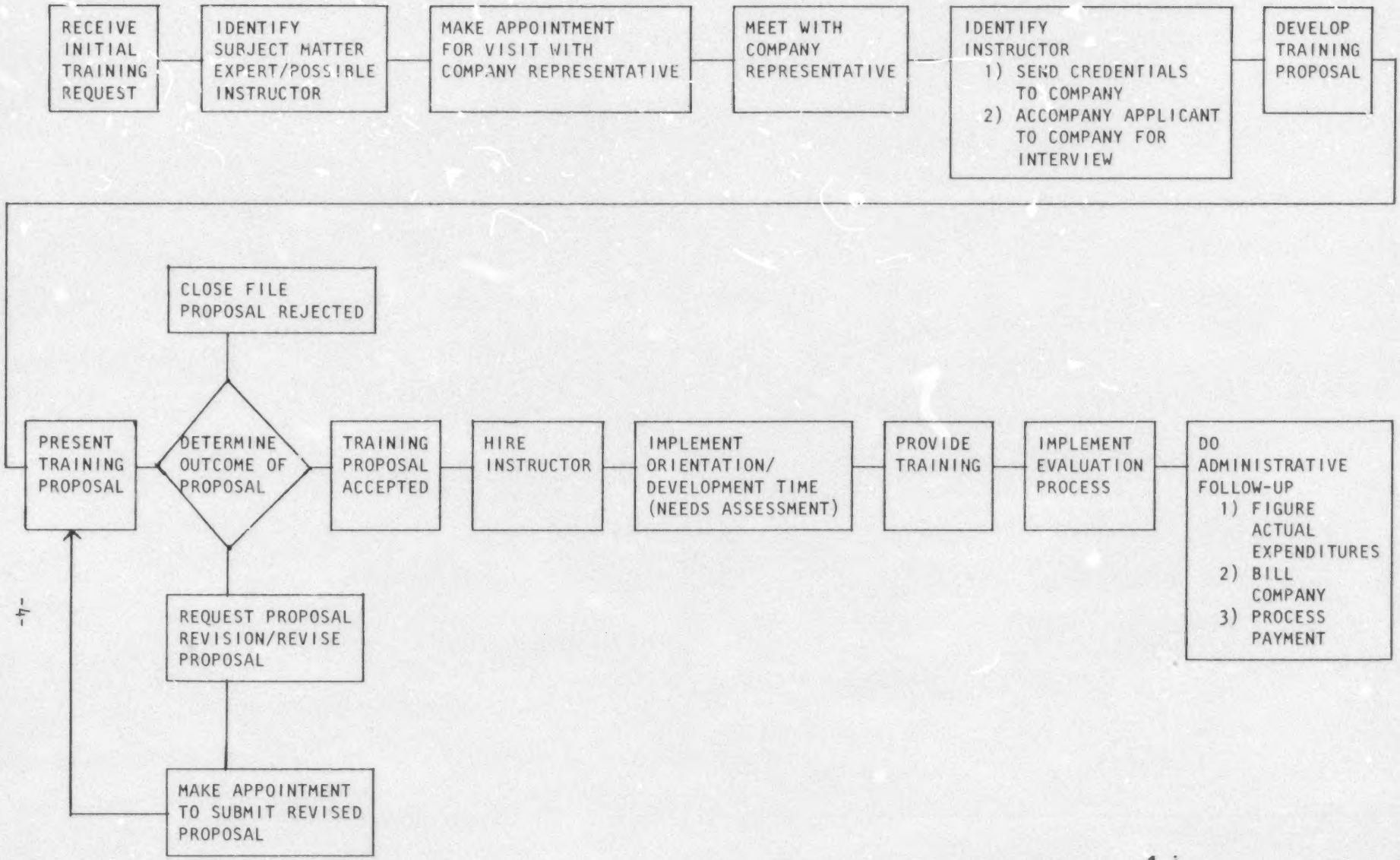
Cooperative Education
Faculty Development
Liberal Studies
Learning Skills Center
Reading
Telecourses

Director, Renner Learning Resources Center
Media Services
Library Public Services
Library Technical Services

OFFICE OF OCCUPATIONAL RELATIONS



STEPS TO CUSTOM DESIGN TRAINING FOR BUSINESS AND INDUSTRY


RECEIVE INITIAL TRAINING REQUEST
IDENTIFY SUBJECT MATTER EXPERT/POSSIBLE INSTRUCTOR
MAKE APPOINTMENT FOR VISIT WITH COMPANY REPRESENTATIVE
MEET WITH COMPANY REPRESENTATIVE
IDENTIFY INSTRUCTOR
1) SEND CREDENTIALS TO COMPANY
2) ACCOMPANY APPLICANT TO COMPANY FOR INTERVIEW
DEVELOP TRAINING PROPOSAL
CLOSE FILE PROPOSAL REJECTED
PRESENT TRAINING PROPOSAL
DETERMINE OUTCOME OF PROPOSAL
TRAINING PROPOSAL ACCEPTED
HIRE INSTRUCTOR
IMPLEMENT ORIENTATION/ DEVELOPMENT TIME (NEEDS ASSESSMENT)
PROVIDE TRAINING
IMPLEMENT EVALUATION PROCESS
DO ADMINISTRATIVE FOLLOW-UP
1) FIGURE ACTUAL EXPENDITURES
2) BILL COMPANY
3) PROCESS PAYMENT
REQUEST PROPOSAL REVISION/REVISE PROPOSAL
MAKE APPOINTMENT TO SUBMIT REVISED PROPOSAL

STEPS TO CUSTOM DESIGN TRAINING FOR BUSINESS AND INDUSTRY

RECIEVE INITIAL TRAINING REQUEST

The initial contact for custom designed training is done in one of two ways. Either the company calls the college with its request, or the need is identified when an account executive calls on the company to market the college's services.

Once the request has been made, the account executive obtains the following information from the company:

- The name and phone number of the company representative who will coordinate the training with the college.
- The subject matter to be taught. Example: Blueprint Reading

The company representative is then advised of the steps that will be taken before, during and after the training. The account executive also advises the representative of the approximate time frame that the process needs.

A folder, which contains the various forms that will be used by the college, is then prepared by the account executive. The folder is labeled with the company name, the training program title, and the semester date. Keeping a supply of these pre-stuffed folders on hand expedites this step.

Samples of the forms in the folder follow this page.

WORKSHEET

TRAINING PROPOSAL

_____

(COMPANY/AGENCY

_____

(SEMESTER/YEAR

Title: _____

(Title) (Code #, Sec. #) (Credit hr(s))

Context:

(days) . . . . . _____

(times) _____

_____

(#sessions, location) _____

(starting, ending dates - # weeks) _____

(# contact hrs) _____

(# Orientation/ development hrs) _____

(Max, Min # participants) _____

(Instructor) _____

Total Cost: (Total or per participant) _____

Submitted by:

_____

Dennis Sienko, Director
Occupational Relations

_____

(Date) (Year)

I agree to the terms identified above:

_____

Contracting Company/Agency Representative

_____

Title

_____

Date

OFFICE OF OCCUPATIONAL RELATIONS

PROPOSED REVENUE/EXPENDITURES BREAKDOWN

CODE # SEC. # TITLE (COMPANY/AGENCY NAME) CREDIT HOURS

REVENUE

Tuition =$_____

_____students @ $_____/student ( )

_____students @ $_____/student ( )

Company/Agency Lump-sum Payment =$_____

Contributions =$_____

Other =$_____

Total Revenue =$_____

EXPENDITURES

Refer to breakdown on back of this page

Total Direct Expenditures =$_____

Balance/Administrative Fee (%) =$_____

OFFICE OF OCCUPATIONAL RELATIONS
PROPOSED EXPENDITURES

CODE # SEC. # TITLE (COMPANY/AGENCY NAME) CREDIT HRS.

INSTRUCTION (non-credit) =$_____
_____hours of instruction @ $_____/hour ( )
_____hours of instruction @ $_____/hour ( )
Lump-sum Instructional Cost ( )

TUITION (credit - includes $1 service fee)
_____students @ $21/credit hr. x _____credit hr(s) =$_____

APPLICATION FEE (credit)
_____students @$10 application fee/student =$_____

LAB FEE (credit)
_____students @ $_____lab fee/student =$_____

PARKING FEE
_____students @ $3 parking fee/student =$_____

ORIENTATION/DEVELOPMENT TIME
_____hours @ $_____/hr. =$_____

FOLLOW-UP AND REVIEW TIME
_____hours @ $_____/hr. =$_____

TRAVEL
_____miles (round trip)/trip @ 20¢ mile x_____round trips =$_____

FOOD (coffee, rolls, lunch, dinner, etc.) =$_____
_____ ( )
_____ ( )
_____ ( )

SUPPLIES/COMMODITIES/BOOKS =$_____
_____ ( )
_____ ( )
_____ ( )

EQUIPMENT =$_____
_____ ( )
_____ ( )

OTHER (xeroxing, postage, bulk mailing, etc) =$_____
_____ ( )
_____ ( )
_____ ( )

TOTAL DIRECT EXPENDITURES =$_____

ADMINISTRATIVE FEE (%) =$_____

TOTAL COST =$_____

COST PER STUDENT ( ) BASED ON _____STUDENTS

ELGIN COMMUNITY COLLEGE
EMPLOYEE ACTION FORM

ACCOUNT NUMBER

☐-☐-☐-☐☐ ☐-☐☐☐☐

EMPLOYMENT—Full and Part Time

_____ is recommended for employment as _____

for the period of _____ to _____ at a salary of _____ per _____.

Education _____; Experience (Creditable Years) _____ Last degree earned: _____.

If appointment other than full time instructional complete the following:

Subject Area/Special Assignment	Room	Time	Days	Credit/Contact

Number of classes in contract _____

Total Amount of contract _____

Remarks:

Appointment Status

___Regular annual
___Overload
___Part time
___Temporary
___Community Ed.
___Other

Type of Appointment

___Administrative
___Associate Personnel
___Classified
___Annual/Tenure
___Non-tenured Faculty Contract
___Part time Faculty
___Special Instructional
___Increment on Annual Contract

_____ DATE _____ ADMINISTRATOR

RESIGNATION—TERMINATION: _____ is recommended for resignation/termination from employment. Effective date _____. Statement (if applicable):

Employee Status: ___regular, ___part time, ___temporary

_____ DATE _____ ADMINISTRATOR

EMPLOYMENT CONSIDERATIONS

Health Insurance_____, Life Insurance_____, Disability Insurance_____, SURS_____, Salary_____.

Federal W-4_____, State W-4_____, Number of Pay Periods_____.

Address: _____ Phone: _____

Social Security Number ☐☐☐-☐☐-☐☐☐☐

Employee Signature _____

APPROVAL: The terms of this appointment are certified by the Personnel Office on _____, by _____ Vice President. The approval of the action requested for full time faculty and administrators has been granted by the Elgin Community College Board of Trustees on _____, by _____ President.

EMPLOYEE—White

1M/4-81/E

Form **W-4**
(Rev. October 1979)

Department of the Treasury—Internal Revenue Service

Employee's Withholding Allowance Certificate

Print your full name ▶ | Your social security number ▶

Address (including ZIP code) ▶

Marital status: ☐ Single ☐ Married ☐ Married, but withhold at higher Single rate

Note: *If married, but legally separated, or spouse is a nonresident alien, check the single block.*

1 Total number of allowances you are claiming (from line F of the worksheet on page 2) . . . . . .

2 Additional amount, if any, you want deducted from each pay (if your employer agrees) . . . . . $

3 I claim exemption from withholding because (see instructions and check boxes below that apply):

a ☐ Last year I did not owe any Federal income tax and had a right to a full refund of **ALL** income tax withheld, **AND**

b ☐ This year I do not expect to owe any Federal income tax and expect to have a right to a full refund of **ALL** income tax withheld. If both a and b apply, enter "EXEMPT" here . . . . . ▶

c If you entered "EXEMPT" on line 3b, are you a full-time student? . . . . . ☐ Yes ☐ No

Under the penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or if claiming exemption from withholding, that I am entitled to claim the exempt status.

Employee's signature ▶ Date ▶ , 19

Employer's name and address (including ZIP code) **(FOR EMPLOYER'S USE ONLY)** | Employer identification number

---------- Detach along this line ----------

▲ *Give the top part of this form to your employer; keep the lower part for your records and information* ▲

Purpose

The law requires that you complete Form W-4 so that your employer can withhold Federal income tax from your pay. Your Form W-4 will remain in effect until you change it, or, if you entered "EXEMPT" on line 3b above, until April 30 of next year. By claiming the number of withholding allowances you are entitled to, you can fit the amount of tax withheld from your wages to your estimated tax liability.

Introduction

If you got a large refund last year, you may be having too much tax withheld. If so, you may want to increase the number of your allowances by claiming any other allowances you are entitled to on line 1 of Form W-4. The kinds of allowances, and how to figure them, are explained in detail in the line-by-line instructions below.

If you owed a large amount of tax last year, you may not be having enough tax withheld. If so, you can claim fewer allowances on line 1, or ask that an additional amount be withheld on line 2, or both.

If the number of withholding allowances that you are entitled to decreases, you must file a new Form W-4 with your employer within 10 days from the date of the change.

If you qualify, you can claim exemption from withholding on line 3b of Form W-4.

The line-by-line instructions below explain how to fill in Form W-4. **Publication 505,** Tax Withholding and Estimated Tax, contains more information on withholding. You can get it from any Internal Revenue Service office.

For more information about who qualifies as your dependent, what deductions you can take, and what tax credits you qualify for, see the Form 1040 Instructions or call any Internal Revenue Service office.

Line-By-Line Instructions

Fill in the identifying information at the top of the form. If you are married and want tax withheld at the regular rate for married persons, check the "Married" box. If you are married and want tax withheld at the higher Single rate (because both you and your spouse work, for example), check the box "Married, but withhold at higher Single rate."

Line 1 of Form W-4

Total number of allowances.—Use the Worksheet on page 2 to figure all of your allowances. Each kind of allowance you may claim is explained below and is identified by the letter that corresponds to the line for that allowance on the Worksheet.

A. Personal allowances.—You can claim the following personal allowances:

- 1 for yourself,
- 1 if you are 65 or older, and
- 1 if you are blind.

If you are married and your spouse either does not work or is not claiming his or her allowances on a separate Form W-4, you may also claim the following allowances:

- 1 for your spouse,
- 1 if your spouse is 65 or older, and
- 1 if your spouse is blind.

If you are single and hold more than one job, you may not claim the same allowances with more than one employer at the same time. If you are married and both you and your spouse are employed, you may not both claim the same allowances with both of your employers at the same time.

Enter your total personal allowances on line A of the Worksheet.

Note: *To have the highest amount of tax withheld, claim "0" personal allowances on line 1.*

B. Special withholding allowance.—You can claim the special withholding allowance **only** if you are single and have one job **or** you are married, have one job, and your spouse does not work.

If you can claim the special withholding allowance, enter "1" on line B of the Worksheet.

Note: *Use the special withholding allowance only to figure your withholding tax. Do not claim it when you file your tax return.*

C. Allowances for dependents.—You may claim one allowance for each dependent you will be able to claim on your Federal income tax return. Enter on line C of the Worksheet the total number of allowances you can claim for dependents.

D. Allowances for estimated tax credits.—If you expect to be able to take the earned income credit, credit for child and dependent care expenses, credit for the elderly, or residential energy credit, these credits may lower your tax. To avoid having too much withheld, you may claim extra allowances for these tax credits on line D of the Worksheet.

To enter the proper figure on line D of the Worksheet, you will have to use the "Tax Credit Table for Figuring Your Withholding Allowances" on the top of page 2.

Note: *Do not claim allowances for your earned income credit if you are receiving advance payment of it.*

E. Allowances for estimated itemized deductions and alimony.—If you expect to itemize your deductions or pay alimony during the year (or both), you may want to claim additional withholding allowances so you will have less tax withheld.

See Schedule A (Form 1040) to find out what deductions you can take and to estimate the amount of your deductions.

Note: *If you are paying alimony but will not itemize deductions, enter your estimate of alimony payments for the year on lines E1 and E3 (enter "0" on line E2). Divide the amount on line E3 by $1,000, and enter the result on line E4 of the Worksheet. Round-off any fraction to the nearest whole number.*

Line 2 of Form W-4

Additional amount, if any, you want deducted from each pay.—If you are not having enough tax withheld from your pay, you may ask your employer to withhold more by filling in an additional amount on line 2.

Often, married couples, both of whom are working, and single persons with two or more jobs, will need to have additional tax withheld.

Estimate the amount by which you will be underwithheld and divide that amount by the number of pay periods in the year. Enter the additional amount you want withheld each pay period on line 2.

Line 3 of Form W-4

Exemption from withholding.—You can claim exemption from withholding only if last year you did not owe any Federal income tax and had a right to a refund of all income tax withheld, and this year you do not expect to owe any Federal income tax and expect to have a right to a refund of all income tax withheld.

If you qualify check boxes 3a and b, write "EXEMPT" on line 3b and answer Yes or No to the question on line 3c.

If you want to claim exemption from withholding next year, you must file a new Form W-4 with your employer on or before April 30 of next year. If you are not having Federal income tax withheld this year, but expect to have a tax liability next year, the law requires you to give your employer a new Form W-4 by December 1.

If you are covered by the Federal Insurance Contributions Act, your employer must withhold social security tax from your pay.

Form IL-W-4
(R-11/79)

ILLINOIS DEPARTMENT OF REVENUE

EMPLOYEE'S ILLINOIS WITHHOLDING EXEMPTION CERTIFICATE

PRINT FULL NAME

SOCIAL SECURITY NO.

HOME ADDRESS

EMPLOYEE:

File this form with your employer. Otherwise he must withhold Illinois income tax from your wages without exemption.

EMPLOYER:

Keep this certificate with your records. If the employee is believed to have claimed too many exemptions, please inform the Illinois Department of Revenue.

HOW TO CLAIM YOUR ILLINOIS WITHHOLDING EXEMPTION

1. Write number of personal and dependency exemptions to which you are ENTITLED on your Federal Income Tax Return (Form 1040 or 1040A) . . . . . ☐
2. To claim your full Illinois exemption, enter the amount shown on Line 1. If you elect to reduce the amount of your Illinois exemption for purposes of withholding Illinois income tax, enter a lesser number . . . . . ☐
3. I claim exemption from withholding (to be checked only if line 3, Federal Form W-4 is checked) ☐

I CERTIFY that the withholding exemption(s) claimed on this certificate does not exceed the amount to which I am entitled on my federal income tax return.

(Date) _____ , 19 _____ (Signed) _____

COMMUNITY EDUCATION OFFERING

TERMINAL DATA

(Please print.)

Semester _____ Course Code _____ Section Number _____

Course Title _____

Course Fee _____ Day(s) Of Week _____

Time of Day _____ Building _____ Room Number _____

Instructor's Name _____ Capacity _____

Starting Date _____ Number of Sessions _____ Ending Date _____

INSTRUCTOR DATA

Social Security Number ___-___-____ Telephone ( ) _____ ( ) _____

Work Home

Address _____

Street City Zip Code

Has the instructor been contacted and agreed to teach the course? YES _____ NO _____

SALARY FORMULA

(List amount of salary after the appropriate formula)

Per Hour _____ Per Student _____ Per Course _____

If per hour, please note the number of contact hours in contract. Hours _____

Total Amount of Contract _____

COURSE SUPPLIES

Anticipated Supplies | Approximate Cost of Supplies | Approved By

_____

_____

FOOD SERVICES

Food Service Requested | Date Needed | Approved By

_____

_____

LOCATION

(List both building and room location.)

On-Campus _____ Off-Campus _____

Special Room Requirements _____

_____

Location Confirmed By _____

AUDIO-VISUAL

Equipment Needed | Dates Needed | Arranged By

_____

_____

ADDITIONAL PERTINENT INFORMATION

_____

_____

NOTE: ATTACH SCHEDULE READY FORMAT

Submitted By _____ Date Submitted _____

Entered Onto Terminal By _____ Date Entered _____

OFFICE OF OCCUPATIONAL RELATIONS

ACTUAL REVENUE/EXPENDITURES BREAKDOWN

CODE # SEC. # TITLE (COMPANY/AGENCY NAME) CREDIT HOURS

REVENUE

Tuition =$_____

_____students @ $_____/student ( )

_____students @ $_____/student ( )

Company/Agency Lump-sum Payment =$_____

Contributions =$_____

Other =$_____

Total Revenue =$_____

EXPENDITURES

Refer to breakdown on back of this page

Total Direct Expenditures =$_____

Balance/Administrative Fee (%) =$_____

OFFICE OF OCCUPATIONAL RELATIONS
ACTUAL EXPENDITURES

CODE # SEC. # TITLE (COMPANY/AGENCY NAME) CREDIT HRS.

INSTRUCTION (non-credit) =$_____
_____hours of instruction @ $_____/hour ( )
_____hours of instruction @ $_____/hour ( )
Lump-sum Instructional Cost ( )

TUITION (credit - includes $1 service fee)
_____students @ $17/credit hr. x _____credit hr(s) =$_____

APPLICATION FEE (credit)
_____students @ $5 application fee/student =$_____

LAB FEE (credit)
_____students @ $_____lab fee/student =$_____

PARKING FEE
_____students @ $2 parking fee/student =$_____

ORIENTATION/DEVELOPMENT TIME
_____hours @ $_____/hr. =$_____

FOLLOW-UP AND REVIEW TIME
_____hours @ $_____/hr. =$_____

TRAVEL
_____miles (round trip)/trip @ 20¢ mile x_____round trips =$_____

FOOD (coffee, rolls, lunch, dinner, etc.) =$_____
_____ ( )
_____ ( )
_____ ( )

SUPPLIES/COMMODITIES/BOOKS =$_____
_____ ( )
_____ ( )
_____ ( )

EQUIPMENT =$_____
_____ ( )
_____ ( )

OTHER (xeroxing, postage, bulk mailing, etc) =$_____
_____ ( )
_____ ( )
_____ ( )

TOTAL DIRECT EXPENDITURES =$_____

ADMINISTRATIVE FEE (%) =$_____

TOTAL COST =$_____

COST PER STUDENT ( ) BASED ON _____STUDENTS

CENTER FOR EMPLOYEE AND MANAGEMENT DEVELOPMENT

ELGIN COMMUNITY COLLEGE

Course: _____

INSTRUCTOR	BELOW AVERAGE	AVERAGE	VERY GOOD
(1) Enthusiasm for teaching or the subject	_____	_____	_____
(2) Knowledge of the subject.	_____	_____	_____
(3) Classroom management (preparation and organization).	_____	_____	_____
(4) Communication skill (use of voice, English, etc.).	_____	_____	_____
(5) The instructor seemed concerned, interested, and willing to help class members.	_____	_____	_____
(6) Overall rating of the instructor.	_____	_____	_____

SEMINAR CONTENT

(1) Was the subject matter appropriate and what you were looking for?	YES _____	NO _____
(2) Do you plan to implement the information into your business?	YES _____	NO _____
(3) Did you achieve your objectives in this seminar?	YES _____	NO _____
(4) Seminar sessions were lively and interesting.	YES _____	NO _____

	BELOW AVERAGE	AVERAGE	VERY GOOD
(5) Overall rating of the seminar content	_____	_____	_____

FACILITIES

(1) Were they appropriate for the class?	YES _____	NO _____
(2) Convenient to reach?	YES _____	NO _____
(3) Attractive, pleasant, etc.?	YES _____	NO _____

IDENTIFY SUBJECT MATTER EXPERT/POSSIBLE INSTRUCTOR

In order to lend credibility to the college when meeting with the company representative, the account executive needs to identify a person who has expertise in the subject to be taught. The subject matter expert accompanies the account executive to meetings with the company representative.

The subject matter expert is identified through the following steps:

- Contact the college's appropriate dean first, maintaining a cooperative relationship between the credit and non-credit sectors of the college.
- Contact appropriate members of the college's faculty second.
- Contact outside sources if no one at the college is able to act as the subject matter expert. Outside sources include the following:
  - Existing contacts/previous instructors
  - Area companies
  - Professional organizations (Examples: SME, SPE, Personnel Assoc.)
  - Other community colleges
  - Yellow Pages

After the subject matter expert is identified, the account executive makes an appointment for a meeting with the company representative.

MEET WITH COMPANY REPRESENTATIVE

The purpose of the meeting attended by the company representative, account executive, and subject matter expert is to tour the company and further identify and clarify the following:

- The subject matter to be taught
- The job categories of the employees that will receive the training
- The number of employees to be trained

- Where the training will take place (on-site or on campus)
- When the training should start and finish
- Whether the training will be offered for credit or non-credit

IDENTIFY INSTRUCTOR

Ideally, the subject matter expert will agree to teach the course. If not, the same steps taken to identify the subject matter expert are used to find an instructor.

The prospective instructor's resume and application are sent to the company representative for review. If the prospective instructor's credentials are approved, an appointment is then made for the company representative to interview the applicant. The account executive accompanies the prospective instructor to the interview. After the company approves the prospective instructor, the training proposal is developed.

DEVELOP TRAINING PROPOSAL

The account executive and subject matter expert/instructor review the information gathered at their meeting with the company representative and develop a rough course outline. They also determine the number of contact hours and orientation/development time necessary. The Training Proposal Worksheet is utilized during this step.

Using the Proposed Revenue/Expenditures Breakdown form, the account executive determines the total cost of the training. That figure is posted to the Training Proposal Worksheet.

The information from the worksheet is then typed on letterhead stationery. This Training Proposal and a proposed course outline are the only documents given to the company. It is suggested that only the total cost, excluding

any specific line item expense breakdown, be presented to the company. The total cost is the maximum amount we will charge, and we never exceed it. The company is advised of this policy

The account executive then makes an appointment to meet with the company representative and present the Training Proposal.

The forms used during this step follow this page.

WORKSHEET

TRAINING PROPOSAL

_____
(COMPANY/AGENCY

_____
(SEMESTER/YEAR

Title: _____
(Title) (Code #, Sec. #) (Credit hr(s))

Context:
(days) . . . . . _____
(times) _____
_____
(#sessions, location) _____
(starting, ending dates - # weeks) _____
(# contact hrs) _____
(# Orientation/ development hrs) _____
(Max, Min # participants) _____
(Instructor) _____

Total Cost: (Total or per participant) _____

Submitted by:

_____
Dennis Sienko, Director
Occupational Relations

_____
(Date) (Year)

I agree to the terms identified above:

_____
Contracting Company/Agency Representative

_____
Title

_____
Date

2-11-82

OFFICE OF OCCUPATIONAL RELATIONS

PROPOSED REVENUE/EXPENDITURES BREAKDOWN

CODE #	SEC. #	TITLE	(COMPANY/AGENCY NAME)	CREDIT HOURS

REVENUE

Tuition =$_____

_____students @ $_____/student ( )

_____students @ $_____/student ( )

Company/Agency Lump-sum Payment =$_____

Contributions =$_____

Other =$_____

Total Revenue =$_____

EXPENDITURES

Refer to breakdown on back of this page

Total Direct Expenditures =$_____

Balance/Administrative Fee (%) =$_____

OFFICE OF OCCUPATIONAL RELATIONS
PROPOSED EXPENDITURES

CODE # SEC. # TITLE (COMPANY/AGENCY NAME) CREDIT HRS.

INSTRUCTION (non-credit) =$_____
_____hours of instruction @ $_____/hour ( )
_____hours of instruction @ $_____/hour ( )
Lump-sum Instructional Cost ( )

TUITION (credit - includes $1 service fee)
_____students @ $21/credit hr. x _____credit hr(s) =$_____

APPLICATION FEE (credit)
_____students @$10 application fee/student =$_____

LAB FEE (credit)
_____students @ $_____lab fee/student =$_____

PARKING FEE
_____students @ $3 parking fee/student =$_____

ORIENTATION/DEVELOPMENT TIME
_____hours @ $_____/hr. =$_____

FOLLOW-UP AND REVIEW TIME
_____hours @ $_____/hr. =$_____

TRAVEL
_____miles (round trip)/trip @ 20¢ mile x_____round trips =$_____

FOOD (coffee, rolls, lunch, dinner, etc.) =$_____
_____ ( )
_____ ( )
_____ ( )

SUPPLIES/COMMODITIES/BOOKS =$_____
_____ ( )
_____ ( )
_____ ( )

EQUIPMENT =$_____
_____ ( )
_____ ( )

OTHER (xeroxing, postage, bulk mailing, etc) =$_____
_____ ( )
_____ ( )
_____ ( )

TOTAL DIRECT EXPENDITURES =$_____

ADMINISTRATIVE FEE (%) =$_____

TOTAL COST =$_____

COST PER STUDENT ( ) BASED ON _____STUDENTS

ELGIN
COMMUNITY
COLLEGE

Community College District 509 1700 Spartan Drive, Elgin, Illinois 60120 Phone: (312) 697-1000

SAMPLE

TRAINING PROPOSAL

Custom Aluminum Products, Inc.

Spring, 1983

Title: Conversational Spanish (CST 800 - 01)

Context:
Tuesdays and Thursdays
4:15 - 5:15 p.m.
20 sessions (all on-site)
10 weeks, May 10 to July 14
20 contact hours
5 hours orientation/development time
15 participants (maximum)
Instructor: Laura Barth

Total Cost: $656.00

Submitted by:

Robert F. Minor
Account Executive
Business/Industrial Training

April 29, 1983

Dennis Sienko
Director
Occupational Relations

I agree to the terms identified above:

Contracting Company/Agency Representative

Title

Date

4/29/83

PRESENT TRAINING PROPOSAL

The account executive and company representative meet to discuss the terms of the proposal and determine if any revisions are necessary. The rough outline of the course is also presented at this time. At this point, the proposal will either be accepted, rejected or returned for revisions.

If the proposal is rejected, the file is closed. If revisions are necessary, the account executive makes the required changes and presents the revised proposal to the company representative at a later date.

TRAINING PROPOSAL ACCEPTED

When the Training Proposal is accepted, it is signed by the account executive, the company representative, and the College's Director of Occupational Relations. The signed Training Proposal serves as a contract, and the original is returned to the company representative.

The account executive then removes all paperwork from the folder and puts it in a permanent file. The file is labeled with the company name, training program title, and semester date.

After the contract is signed, the account executive hires the instructor who then signs a teaching contract with the college and fills out the necessary tax forms. The instructor is a part-time employee of the college, not the company.

IMPLEMENT ORIENTATION/DEVELOPMENT TIME (NEEDS ASSESSMENT)

This step is critical to the success of the training. The instructor does most of the work at this point, but the account executive also has certain responsibilities.

The account executive does the following:

- Arranges for a classroom if the training is to be conducted on campus
- Orders textbooks and materials if necessary
- Arranges for the class to be entered into the College's records (It then becomes part of the system used for regular courses at the College.)

The instructor does the following:

- Establishes a rapport with company personnel, Example: personnel/ training director, supervisors, foremen, and employees who will receive training
- Learns the company's policies, procedures, and products
- Becomes familiar with the facility
- Determines specifics of what is to be taught by talking with the the trainees and their superiors
- Determines the skill level of employees to be trained by talking with them and their superiors
- Identifies the performance objectives that are to be met as a result of the training
- Develops a detailed course outline and presents it to the company representative for approval
- Revises the course outline if necessary
- Advises the account executive which materials, if any, need to be ordered
- Prepares materials that do not need to be ordered
- Keeps account executive informed of progress

PROVIDE TRAINING

The training is conducted according to the contract and course outline. On the first day of training the account executive visits the class and gives a brief orientation.

The orientation includes the following:

- A welcome to the company personnel in attendance

- A synopsis of how the training program evolved
- A summary of what will be accomplished during the training
- An introduction of the instructor

The account executive visits the class again on the last day of training, summarizing what took place and thanking the participants.

Throughout the duration of the training, the account executive maintains communication with the instructor and the company representative, assisting with any problems that may arise.

IMPLEMENT EVALUATION PROCESS

During the last class meeting, the employees trained fill out a written course and instructor evaluation form. The form is not signed.

Within three weeks after the training ends, the account executive, instructor, and company representative meet to verbally evaluate the course and instructor.

A summary of the evaluations is sent to the instructor and company representative.

The evaluation form used follows this page.

CENTER FOR EMPLOYEE AND MANAGEMENT DEVELOPMENT

ELGIN COMMUNITY COLLEGE

Course: _____

INSTRUCTOR	BELOW AVERAGE	AVERAGE	VERY GOOD
(1) Enthusiasm for teaching or the subject	_____	_____	_____
(2) Knowledge of the subject.	_____	_____	_____
(3) Classroom management (preparation and organization).	_____	_____	_____
(4) Communication skill (use of voice, English, etc.).	_____	_____	_____
(5) The instructor seemed concerned, interested, and willing to help class members.	_____	_____	_____
(6) Overall rating of the instructor.	_____	_____	_____

SEMINAR CONTENT

(1) Was the subject matter appropriate and what you were looking for?	YES _____	NO _____
(2) Do you plan to implement the information into your business?	YES _____	NO _____
(3) Did you achieve your objectives in this seminar?	YES _____	NO _____
(4) Seminar sessions were lively and interesting.	YES _____	NO _____

	BELOW AVERAGE	AVERAGE	VERY GOOD
(5) Overall rating of the seminar content	_____	_____	_____

FACILITIES

(1) Were they appropriate for the class?	YES _____	NO _____
(2) Convenient to reach?	YES _____	NO _____
(3) Attractive, pleasant, etc.?	YES _____	NO _____

DO ADMINISTRATIVE FOLLOW-UP

The account executive figures the actual revenue and expenditures using the forms following this page. The total cost is then billed to the company. Regular college invoice forms are used for the billing, which is prepared by the account executive.

The amount billed never exceeds the total cost contracted for, but if the circumstances warrant it, the amount billed may be less than what is stated in the contract.

The company mails its payment directly to the college's business office where it is processed the same as any other payment.

Samples of the forms used follow this page.

OFFICE OF OCCUPATIONAL RELATIONS

ACTUAL REVENUE/EXPENDITURES BREAKDOWN

CODE #	SEC. #	TITLE	(COMPANY/AGENCY NAME)	CREDIT HOURS

REVENUE

Tuition =$_____

_____students @ $_____/student ( )

_____students @ $_____/student ( )

Company/Agency Lump-sum Payment =$_____

Contributions =$_____

Other =$_____

Total Revenue =$_____

EXPENDITURES

Refer to breakdown on back of this page

Total Direct Expenditures =$_____

Balance/Administrative Fee (%) =$_____

OFFICE OF OCCUPATIONAL RELATIONS
ACTUAL EXPENDITURES

CODE # SEC. # TITLE (COMPANY/AGENCY NAME) CREDIT HRS.

INSTRUCTION (non-credit) =$_____
_____hours of instruction @ $_____/hour ( )
_____hours of instruction @ $_____/hour ( )
Lump-sum Instructional Cost ( )

TUITION (credit - includes $1 service fee)
_____students @ $21/credit hr. x _____credit hr(s) =$_____

APPLICATION FEE (credit)
_____students @$10 application fee/student =$_____

LAB FEE (credit)
_____students @ $_____lab fee/student =$_____

PARKING FEE
_____students @ $3 parking fee/student =$_____

ORIENTATION/DEVELOPMENT TIME
_____hours @ $_____/hr. =$_____

FOLLOW-UP AND REVIEW TIME
_____hours @ $_____/hr. =$_____

TRAVEL
_____miles (round trip)/trip @ 20¢ mile x_____round trips =$_____

FOOD (coffee, rolls, lunch, dinner, etc.) =$_____
_____ ( )
_____ ( )
_____ ( )

SUPPLIES/COMMODITIES/BOOKS =$_____
_____ ( )
_____ ( )
_____ ( )

EQUIPMENT =$_____
_____ ( )
_____ ( )

OTHER (xeroxing, postage, bulk mailing, etc) =$_____
_____ ( )
_____ ( )
_____ ( )

TOTAL DIRECT EXPENDITURES =$_____

ADMINISTRATIVE FEE (%) =$_____

TOTAL COST =$_____

COST PER STUDENT ( ) BASED ON _____STUDENTS